

Outlook for Leisure Travel and Attractions

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Brand USA

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BRAND USA

Insights & Initiatives

Marketing
Outlook
Forum



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**The Travel Promotion Act
signed into law March 2010**

Official White House Photo by Lawrence Jackson

Roles in the US Travel Industry



PROMOTE

- Lead the nation's global marketing effort
- Communicate US entry and security processes
- Create a welcoming experience for International tourists

TRAVEL & TOURISM INDUSTRY

ADVISE



**Advise the Secretary of Commerce on
Issues Affecting the Travel Industry**



ADVOCATE

- Advocate for policies to remove travel barriers
- Communicate benefits of travel to policymakers
- Provide industry networking opportunities



Amplify or strengths?
Or address our
weaknesses?

Reinvigorate
historically strong
markets? Or focus on
emerging ones?

How do we balance
domestic interests and
international commercial
opportunities?

Smaller and more
frequent ads, or fewer and
louder?

Is it worth sacrificing
reach for efficiency?

How much should we
invest in long term
initiatives?





Market
Prioritization

The Spaghetti &
Meatballs Model

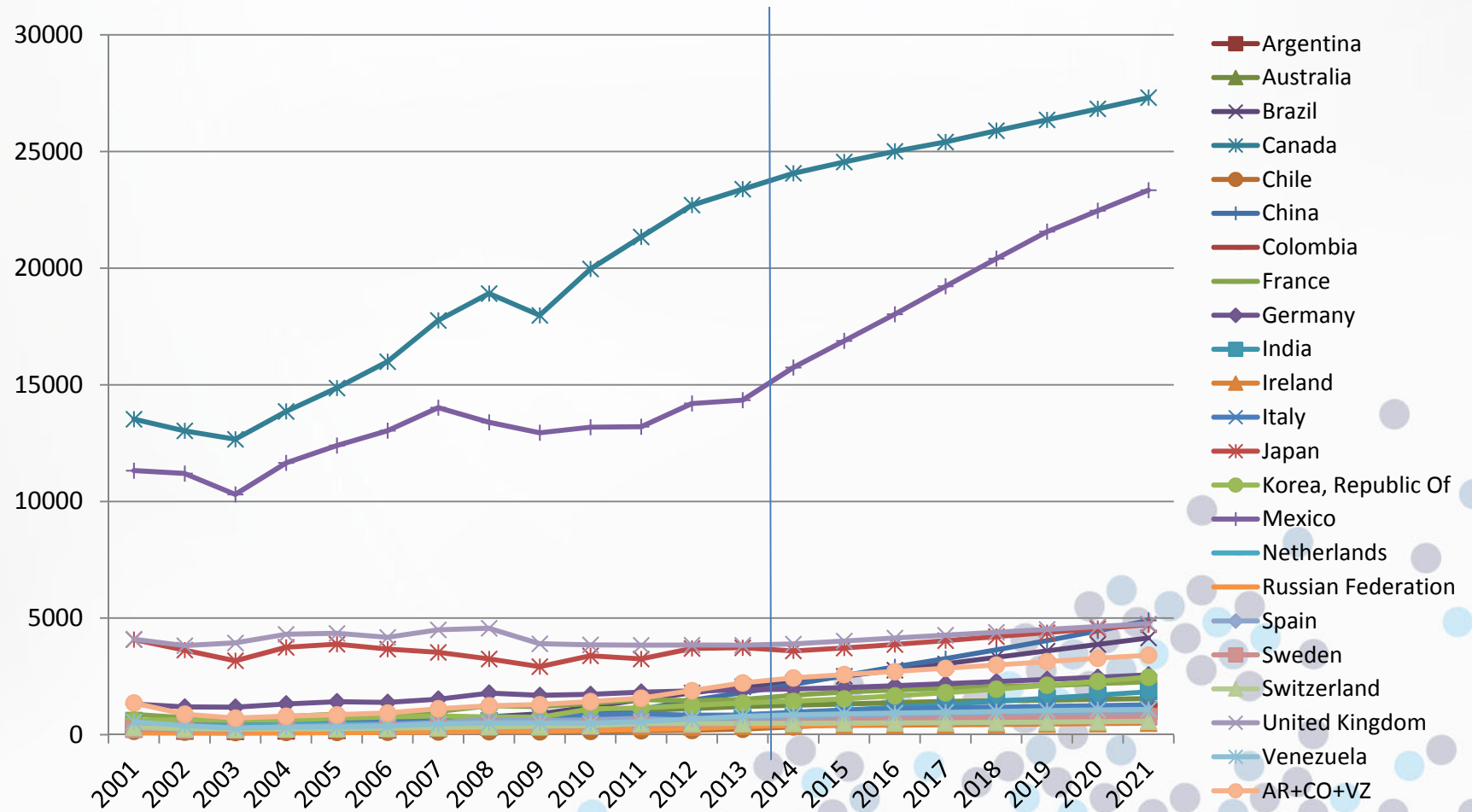
100 million
visitors by 2021

4.6%
CAGR



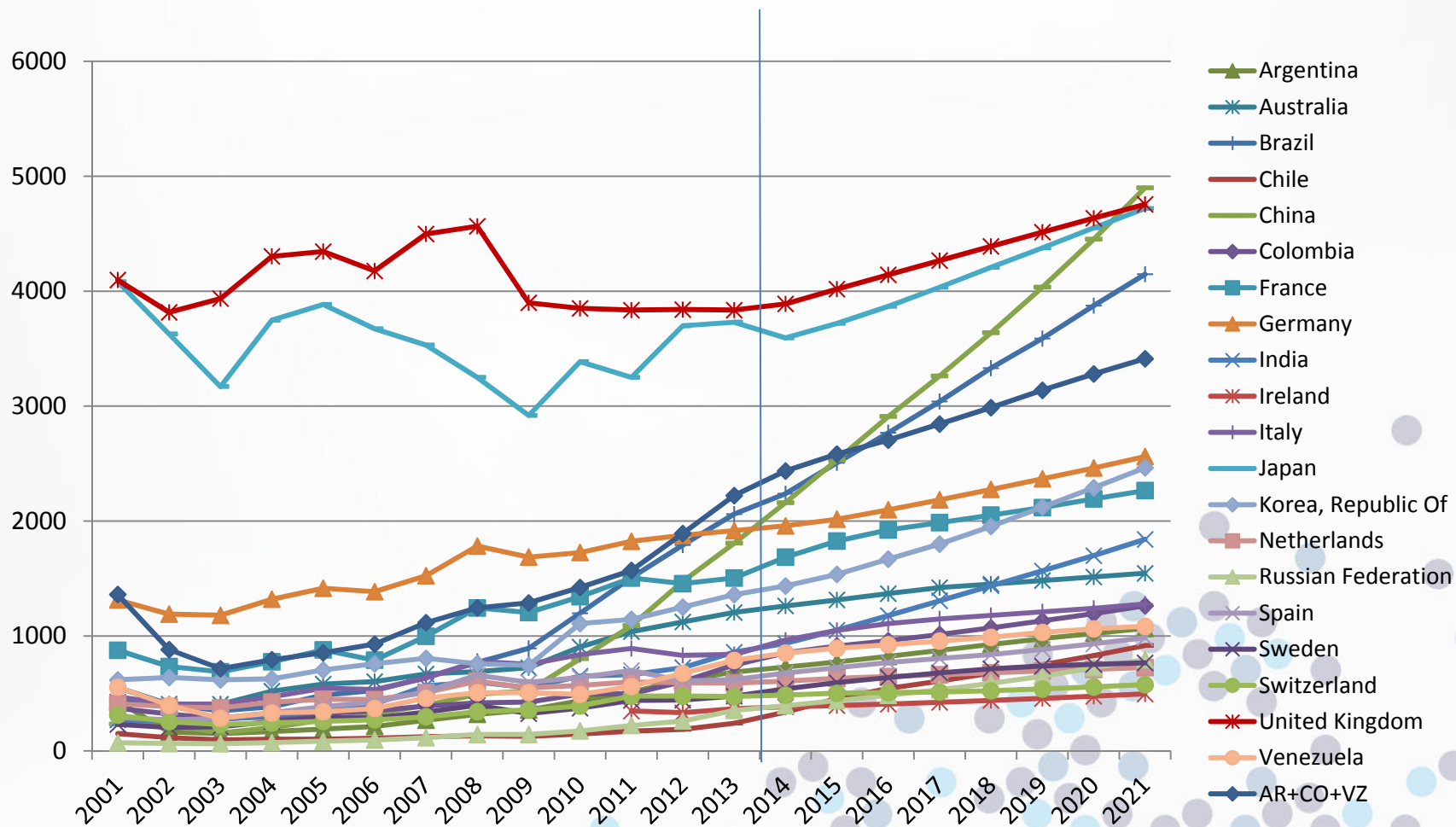


Path to 100 Million Arrivals

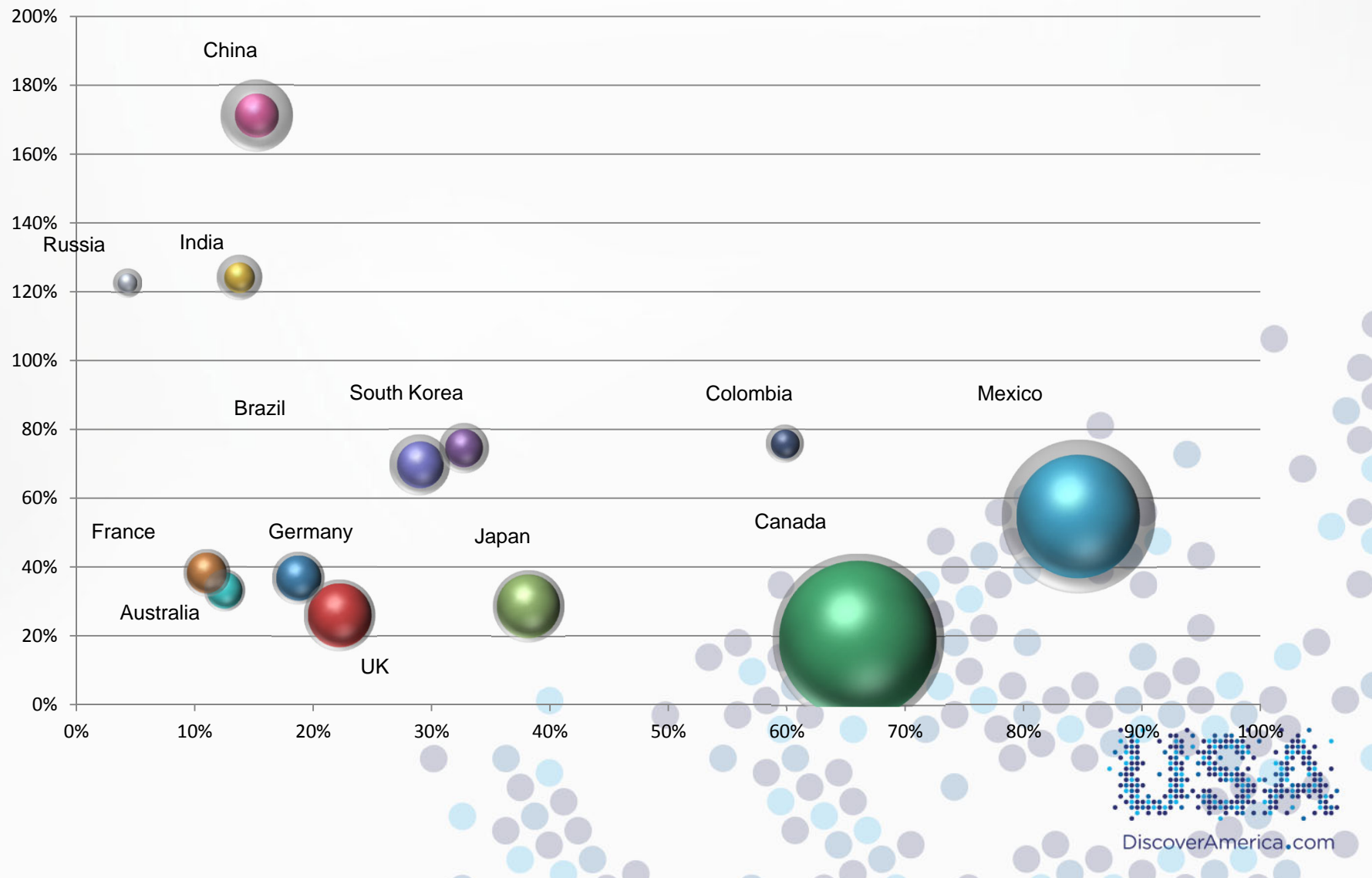




Path to 100 Million Arrivals

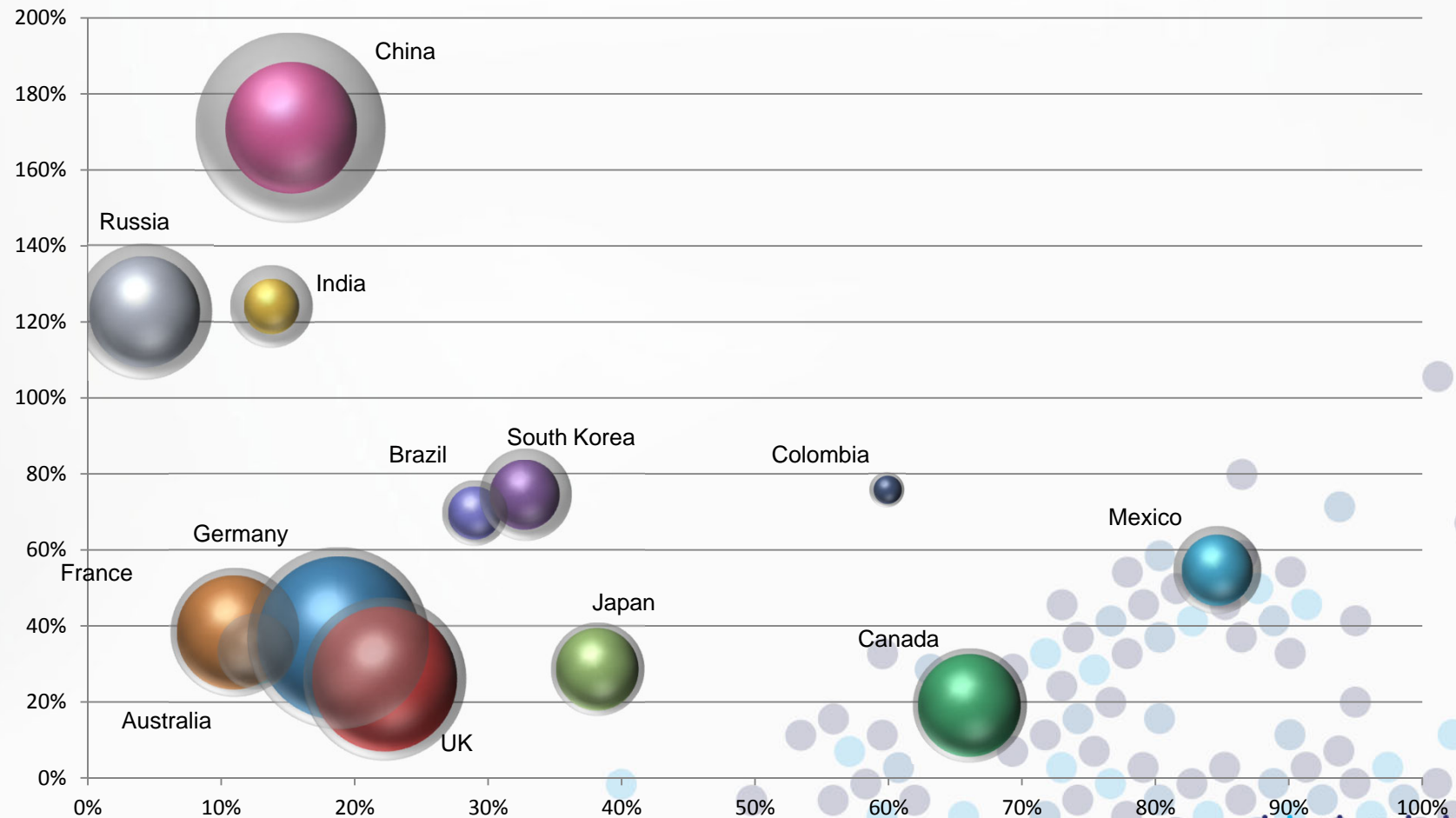


USA Arrivals 2013 vs. 2021





Total International Departures 2013 vs. 2021



Marketing Initiatives in 33 markets

Brand, co-op, or trade in markets contributing over 90% of inbound travel to the USA





Balanced Approach to Marketing & Advertising Budget Allocation

Economic
Indicators

Commercial
Trends

Cultural Trends

Media Trends



Global Focal Points

Social Focus

China

Brazil

Mexico

UK

Trade Focus

China

Germany

Specialized Inspiration

Japan

Mexico

Airline/Capacity Focus

Latin America

UK

Australia

Japan





BRAND USA Initiatives

Great
Outdoors



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Example: German Consumers – Weighted Perception of US Characteristics

Motivators	
Activity options (mountain climbing, diving)	38
Landmarks and sightseeing options (historical sites, museums)	50
Leisure attractions (dining, shopping, nightlife)	46
Natural features/landscapes (mountains, rainforests)	55
Ease of travel to the destination (length of flight, number of stops)	38
Quality of beaches	44
Appeal of local culture (food, music, etc.)	41
Reputation/popularity as a travel destination	35
AVERAGE	43

Demotivators	
Inconvenience of travel to the destination (no direct flights)	13
Distance from home	5
Crowdedness	24
Visa requirements/entry procedures	16
Safety concerns/political instability	22
Lack of visitor resources/support in the destination	10
Unfamiliarity with local customs/language	3
High prices	23
AVERAGE	14

<~25 = Not a factor

~25 - ~50 = A contributing factor

~50+ = A strong factor

Question: When considering the following countries as holiday destinations, how would you rate each on the following characteristics? Please rate each characteristic on a scale from 1 to 5 (1 being poor, 3 being adequate and 5 being excellent); How would you rate each characteristic that might discourage you from considering it. Please rate each characteristic on a scale from 1 to 5 (1 being not at all discouraging/not applicable, 3 being moderately discouraging and 5 being extremely discouraging).

Base: Germany intercontinental travelers (N=1089)

Source: Brand USA Custom Study





BRAND USA Initiatives

Project
Phoenix



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Research & Analytics: Special Projects

Project Phoenix

Dreamcatcher



Consumer focus groups on perceptions of the USA and the DMO value proposition

Explorer



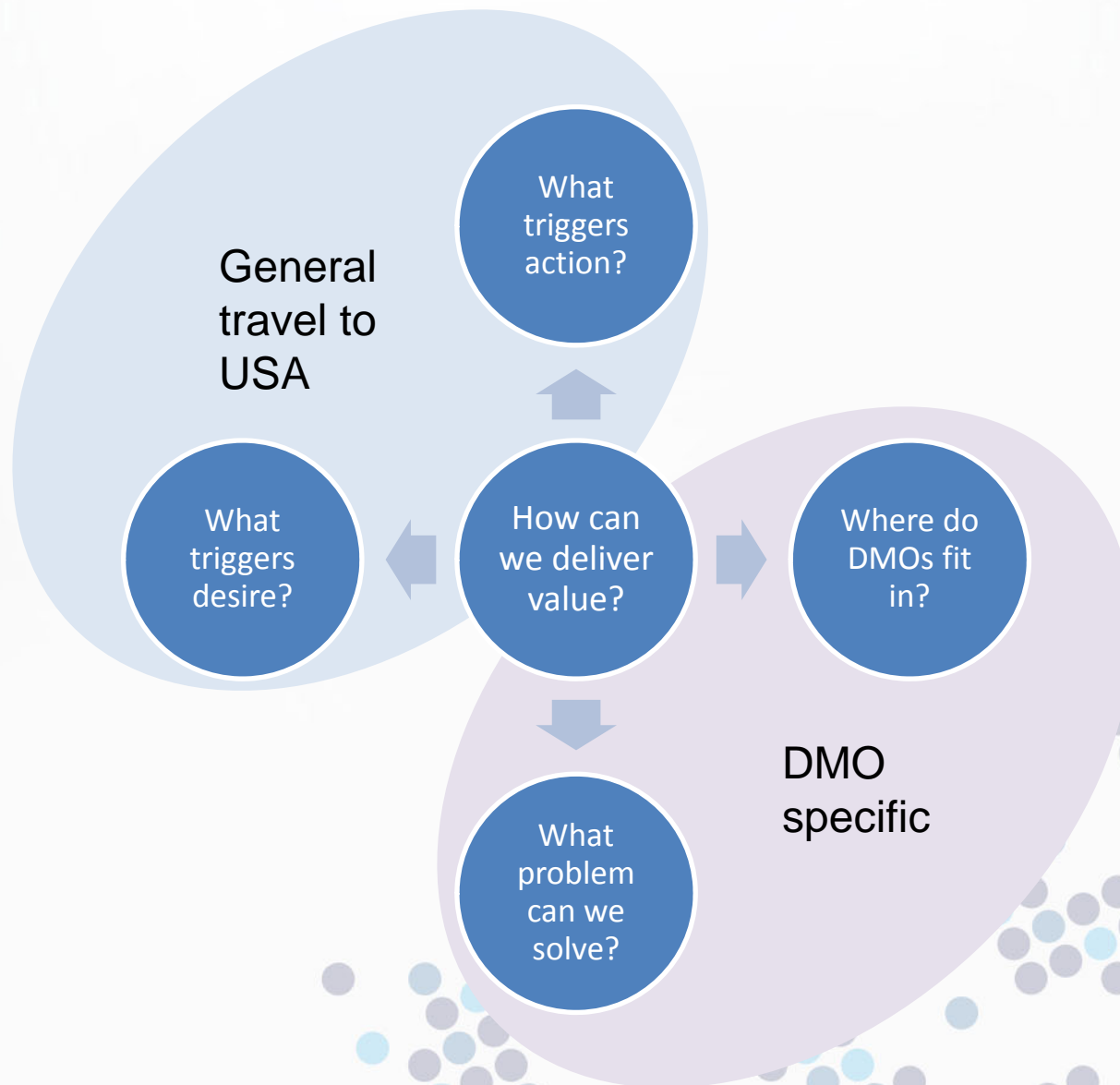
Quantitative study focused on guiding website development

Narrator



Creative development workshops

Dreamcatcher Objectives





Dreamcatcher Markets



Australia



Brazil



Canada



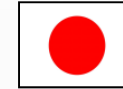
China



Germany



India



Japan



Mexico



UK

Methodology

4 Sessions
2 Markets

4 Sessions
2 Markets

6 Sessions
3 Markets

6 Sessions
3 Markets

4 Sessions
2 Markets

4 Sessions
2 Markets

4 Sessions
2 Markets

4 Sessions
2 Markets

4 Sessions
2 Markets

Market

Sydney
Melbourne

Rio de
Janeiro
Sao Paulo

Toronto
Vancouver
Montreal

Beijing
Shanghai
Guangzhou

Frankfurt
Munich

Mumbai
Delhi

Tokyo
Osaka

Mexico City
Guadalajara

London
Manchester

Details

- 90 minutes sessions
- Recruiting for 8 completes per group
- Held on one or two days per city

9

countries

20

markets

40

total focus groups



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Research Coop Programs

